

Why AJ Bell Platinum SIPP?

Introduction to AJ Bell

AJ Bell was set up in 1995 as an actuarial consultancy and bespoke SSAS provider. A few years later, we started offering SIPPs too. Since then, AJ Bell has diversified and grown to become one of the UK's largest investment platforms, with £95.3 billion of assets under administration. Much has changed since our early years, but SSAS and SIPP remain core parts of the company.

Today our bespoke SIPP and SSAS products come under the AJ Bell Platinum brand. For more information, please visit our dedicated website: ajbellplatinum.co.uk.

Why SIPP?

A wide range of investment opportunities are available within the AJ Bell Platinum SIPP, including:

- cash deposits;
- National Savings & Investment products;
- discretionary investment managers;
- directly managed portfolios of stocks and shares, unit trusts and investment trusts;
- insured investments, including Trustee Investment Plans; and
- fixed-interest stocks.

It is generally easier to achieve separation of assets in SIPPs, as opposed to a SSAS, if members wish to make independent investment decisions. For this reason, co-directors in a business may prefer the SIPP option, particularly if there is a difference in term to retirement or attitude to investment risk.

Testimonials

The best way to understand the value of our service is to hear from people who already use it.

We recommend AJ Bell Platinum because they have an experienced team of readily accessible and technically strong trustee consultants. They are backed up by a fluent back office team who deliver documents fast and liaise with us at any turn.

Andy Hiatt, Hiatt Financial, Staffordshire.

We specialise in bespoke pension planning and deal with many SIPPs and SSAS schemes for our clients and place a very high emphasis on the need for quality service from the scheme providers in terms of professionalism, technical knowledge, administrative support and accessibility. The importance of these aspects of pension planning cannot be over-emphasised and I am happy to report that our many experiences with the AJ Bell Platinum Team has always supported our faith in the quality of their personnel, their integrity and commitment to the high standards that are an essential component in this area of financial planning.

Angela Maher, Managing Director, Acumen Financial Partnership, Liverpool

AJ Bell has the finest technical team in the UK on all things pensions, they have by far and away the best products and service standards. We have been using Andy Bell's firm for years and its been a real pleasure.

Steve Lyth, Alchemy Advisory Services, St Asaph

Our consultants

AJ Bell Platinum aims to deliver the very highest level of service. We do that by building close working relationships with our clients, taking the time to understand their particular requirements, and making sure our expert guidance is delivered in a way that is easy to understand. Key to it all are the AJ Bell Platinum consultants.



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Awards

AJ Bell's products win prestigious industry awards year after year. Many of these accolades are awarded by judging panels of industry experts.

Professional Paraplanner Awards

- Best Full SIPP Provider 2022 (2021)

Money Marketing Awards

- Provider of the Year 2023 (2022, 2021)
- Best Platform 2022 (2021)
- Best Retirement Provider 2022 (2021)
- Best Investment Solutions Provider 2024
- Best SIPP 2024

Professional Adviser Awards

- Best platform for Advisers (AUA over £25bn) 2021

UK Platform Awards

- Leading Retirement Proposition 2021

Summary of the features

- The SIPP is provided by AJ Bell – a leading provider of trustee and administration services for Self-Invested Personal Pensions.
- AJ Bell Platinum SIPPs are established as a trust, with the member and AJ Bell (PP) Trustees Limited appointed as its trustees.
- You can appoint any UK Investment Manager to invest SIPP funds on your behalf.
- Each AJ Bell Platinum SIPP has a dedicated administration team and access to our consultants.
- Our fees are clearly stated and reflect the level of work we carry out. Fees will be paid out of the member's fund.